

FORM 1
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INDIVIDUAL ESTATE PROPERTY RECORD AND REPORT
ASSET CASES

Case No: 10-54982 CMC Judge: Charles M. Caldwell Trustee Name: Amy L. Bostic
Case Name: James R Wharton Date Filed (f) or Converted (c): 11/04/2014 (c)
Kathleen R Wharton 341(a) Meeting Date: 12/08/2014
For Period Ending: 02/25/2015 Claims Bar Date: 05/07/2015

1	2	3	4	5	6
Asset Description (Scheduled and Unscheduled (u) Property)	Petition/ Unscheduled Values	Est Net Value (Value Determined by Trustee, Less Liens, Exemptions, and Other Costs)	Property Formally Abandoned OA=554(a)	Sale/Funds Received by the Estate	Asset Fully Administered (FA)/ Gross Value of Remaining Assets
1. 123-125 S. Ogden Avenue Columbus, Oh 43204	68,200.00	0.00	OA	0.00	FA
2. Heartland Savings	8.00	0.00		0.00	FA
3. Heartland Checking	50.00	0.00		0.00	FA
4. Landlord	500.00	0.00		0.00	FA
5. Misc Furniture	1,000.00	0.00		0.00	FA
6. Misc Clothing	1,000.00	0.00		0.00	FA
7. Whole Life Insurance Policy On Child - Debtors Are Beneficia	390.47	0.00		0.00	1.00
8. Whole Life Insurance Policy On Child - Debtors Are Beneficia	671.59	0.00		0.00	1.00
9. Whole Life Insurance Policy - Husband Is Beneficiary - Monum	1,264.00	0.00		0.00	FA
10. Whole Life Insurance Policy - Wife Is Beneficiary - Monument	2,017.00	0.00		0.00	FA
11. Whole Life Insurance Policy On Child - Debtors Are Beneficia	753.96	0.00		0.00	1.00
12. Whole Life Insurance Policy On Grandchild - Debtors Are Bene	144.82	0.00		0.00	1.00
13. Whole Life Insurance Policy On Grandchild - Debtors Are Bene	213.26	0.00		0.00	1.00
14. Whole Life Insurance Policy On Grandchild - Debtors Are Bene	105.21	0.00		0.00	FA
15. Whole Life Insurance Policy On Grandchild - Debtors Are Bene	98.38	0.00		0.00	1.00
16. Whole Life Insurance Policy - Wife Is Beneficiary - Monument	607.00	0.00		0.00	FA
17. 401(K)	48,279.00	0.00		0.00	FA
18. 401(K)	11,393.00	0.00		0.00	FA
19. 2009 Tax Refund	724.00	0.00		0.00	FA
20. 2003 Cadillac Seville	6,100.00	0.00		0.00	FA

Gross Value of Remaining Assets

TOTALS (Excluding Unknown Values) \$143,519.69 \$0.00 \$0.00 \$6.00

(Total Dollar Amount in Column 6)

Major activities affecting case closing which are not reflected above, and matters pending, date of hearing to be held, and other action:

2/11/15: Trustee received information that the owner of one of the policies on a grandchild's life is neither of the Debtors. The Trustee will no longer pursue turnover of the cash value on that policy.

02/05/15: Trustee filed objection to amended exemptions filed 2/3/15. TERRY SOMA

02/04/15: The Trustee will investigate the potential cash surrender value of several life insurance policies for liquidation. The Trustee has requested copies of the policies for that determination.

2/3/15: Trustee calculated excess cash values in life insurance and will be administering the case for that cash value.

1/19/15: Trustee reviewed documents and was able to calculate rough estimates of potential cash value. Based on remaining exemptions available there should no value to estate. Debtor needs provide actual cash balances and amend exemptions for Rule 2004 exam to go away.

1/14/15: Trustee filed motion for 2004 exam & production of documents. To be held February 12, 2015 at 11:00 am. TERRY SOMA

RE PROP #	1	--	12/12/14 Trustee signed abandonment
RE PROP #	7	--	per amended schedule filed 2/3/15
RE PROP #	8	--	per amended schedule filed 2/3/15
RE PROP #	11	--	per amended schedule filed 2/3/15
RE PROP #	12	--	per amended schedule filed 2/3/15
RE PROP #	13	--	per amended schedule filed 2/3/15
RE PROP #	14	--	per amended schedule filed 2/3/15
RE PROP #	15	--	per amended schedule filed 2/3/15

Initial Projected Date of Final Report (TFR): 12/08/2015

Current Projected Date of Final Report (TFR): 12/08/2015

Trustee Signature: /s/ Amy L. Bostic Date: 02/25/2015

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